

**Legal Aid Society  
Strategic Plan**

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## INTRODUCTION

The Legal Aid Society launched a process to develop a three-year strategic plan in October, 1999.

Members of Legal Aid Society's management team, staff and board were represented during the eleven-month process used to develop a three-year strategic plan. Data analyzed in the preparation of the plan included: a 1999 client survey of needs (163 responses); a 1999 community needs survey (175 responses); results from previous management and board reviews of the internal needs of Legal Aid Society, and a survey of staff administered in May, 2000.

Members of the strategic planning team wanted a strategic plan that will generate results. The team wanted the process to be an inclusive one that would gain a better sense of current functioning, organize a clear picture of the direction of the organization, and develop a system of resource allocation that matches client needs.

The staff reviewed and revised a proposed mission statement. Although the existing mission statement was substantive and clear, the general thinking of the group was to create a mission statement that is compelling and clear regarding the purpose of the organization *and* one that is easy to remember. "Pursue justice for people in poverty," is the mission statement that received the greatest level of support from staff.

The team selected five general focal points for developing strategic objectives: 1) client services; 2) advocacy for social policy; 3) coordination and administration; 4) fund development and; 5) public relations.

Specific strategies were developed to accomplish each objective. Each strategy requires the formulation of an action plan, which will be the responsibility of action teams. The management team and board of directors will oversee the ongoing review and develop the annual work plan within the framework of the approved three-year strategic plan.

## EXECUTIVE SUMMARY

**History of Legal Aid Society in U.S.: Societies were founded at turn of century in large, northeast cities and significant national trends followed.**

Legal Aid Societies were developed in the larger, northeastern cities in the U.S. at the turn of the century to assist the poor, primarily immigrants at that time, in their struggle for jobs, civil rights and justice. Bar associations were frequently active in the formation of legal aid groups.

A major period of growth in legal aid services in the U.S. occurred first during the 1960s when Sargent Shriver was appointed to the newly developed national legal services for the poor as part of President Johnson's War on Poverty. The Legal Services Corporation was enacted in 1974 and created a bipartisan board of directors.

A second major growth occurred during the late 70s with the expansion of legal services to all 50 states, including rural areas.

Federal funding was reduced in the 1980s, resulting in office closings and staff layoffs. Concurrently, restrictions were enacted that resulted in limiting the range of legal aid services to low-income individuals. Funding declines continued or remained flat until a modest increase in federal funding occurred in the late 1990s.

**History of Legal Aid Services in Louisville since 1921: There have been only four executive directors our 80 years of community and legal services to low-income individuals and families.**

Several groups, notably the Women's Club and the Louisville Bar Association, formed Louisville's Legal Aid Society in 1921. Legal Aid in Louisville has had remarkably consistent leadership, beginning with the 43 years Emmet Field served as the executive director. Only four executive directors have served in that position in our 80 years of operation.

In the late 60s, our focus broadened to deal with the more systemic problems of people in poverty rather than on the sole service of individual client representation. Chief among local activities at that time were issues involving school segregation.

In 1972, under the leadership of Kurt Berggren, our legal aid efforts centered on impact litigation, class action and consumer protection.

Legal aid services expanded from Jefferson to 14 surrounding counties in 1978 through the support of a Community Development Block Grant (1972-78). Offices were opened in Elizabethtown and Shelbyville. Services continue to be

**Where We Are Today:  
LAS serves Louisville and  
15 surrounding counties**

offered to residents in the 14 counties but, due to budget cuts, the offices in Elizabethtown and Shelbyville were closed in 1981.

LAS serves clients in 15 counties surrounding Louisville in many areas of civil law. The basic programs address consumer needs, family issues, government benefits, community development and housing law issues.

Special outreach programs include TeamChild (children at risk and involved in juvenile court), HIV/AIDS Legal Project, Title III (seniors over 60), Nursing Home Ombudsman Program, and the Volunteer Lawyer Program (VLP).

Surveys showed that the needs of our clients most frequently occur in the following categories: family law; housing; disabilities; public benefits; consumer issues; and utilities. We have therefore directed our services to address issues of safety, stability and health, maintaining economic stability, preserving the home, supporting families and working with populations with special vulnerabilities.

**Challenges and Strengths**

Legal Aid Society is challenged to continue its array of individual case services for clients at a time of increasing demand for services and decreasing funding. Restrictions imposed by Legal Services Corporation limit the activities in which Legal Aid Society may engage to improve the conditions in which our clients live. When Legal Aid Society does intervene on behalf of a client, the client benefits from effective advocacy from experts in poverty law. Legal Aid Society's various programs have a record of success in achieving favorable results for individual clients. The staff is mission driven and committed to excellence in service.

**Where We Want To Be In  
Three Years**

Legal Aid Society is committed to strengthening core services and to fashioning a service delivery system that meets clients' evolving needs. Legal Aid Society must not only form collaborative partnerships with other service providers to meet the needs of low-income clients, but we must explore creative ways to encourage preventive education and client self-representation. Finally, the success of Legal Aid Society depends upon our ability to educate the community that, even in an era of unparalleled economic success, a significant number of our neighbors live in poverty and have legal needs on which our help is essential.

## **BRIEF HISTORY OF LEGAL AID SERVICES**

### National Origin and Trends

The history of Legal Aid Societies' representation of the poor began at the turn of the century with organized efforts to help immigrant clients in large northeastern cities such as New York, Philadelphia, and Cleveland. In the early decades of the 20th century, Legal Aid Societies began to spring up in a number of large metropolitan areas, in many cases founded and supported by the local bar associations. The program in Louisville, for instance, got underway and began serving clients in 1921.

In the decades that followed, fledgling Legal Aid Societies received the support of state and local bar associations out of recognition that the Societies' work with the impoverished was essential. In larger metropolitan areas where the incidence of poverty was great, Legal Aid Societies served as functionaries of the justice system—providing assurance to the local community that the poor had equal access to the courts. Many programs, despite paltry resources, expanded to meet the needs of the increasing population living in poverty.

In the mid-60s, ideas were proposed for a national program of legal assistance for the poor as part of President Johnson's War on Poverty. Sargent Shriver, then head of the Office of Economic Opportunity, was charged with appointing the leaders and establishing a mission for this new venture to be funded out of congressional budget allocations. The discussions prompting this new venture also suggested that legal services for the poor should play a greater role than merely resolving the immediate crisis for the client. Clinton Bamberger, Jr., the first director of this national legal services program, advocated that the program's role was to provide the means within the democratic

process for the law and lawyers to release the bonds which imprison people in poverty and to marshal the forces of law to combat the causes and effect of poverty. Poverty lawyers were to engage in the effort to reform and improve political and social institutions that affect poor communities. By the end of 1965, there were 27 OEO-funded legal service programs throughout the country; more than half of those were Legal Aid Societies.

In 1974, President Nixon signed the first Legal Services Corporation Act, which provided for a bipartisan Board of Directors and national funding for legal assistance programs. The role of the poverty lawyer as an active participant in a social movement was tempered by restrictions that were placed on Legal Aid Societies receiving funding from Legal Services Corporation. Legal Services Corporation imposed a battery of restrictions aimed at keeping legal service programs out of any activities that could be construed as political.

In 1978, under President Carter, Congress approved significant additional funding for Legal Services programs to serve clients in every part of each of the 50 states plus the territories, such as Puerto Rico and the Virgin Islands. Many programs expanded from their urban base and developed rural components. During this “expansionist” period, program funding levels were raised to provide for basic legal services in existing programs and additional funds were granted to new and existing programs for the purpose of serving clients in areas previously unserved.

If the 1960s and 1970s represented a period of federal support for legal assistance for the poor, the 1980s represented the bleak extreme. The executive branch’s hostility to federal funding for legal services for the poor resulted in drastic cuts to programs. In

1983, the number of poverty law programs funded by Legal Services Corporation dropped by 25% and programs that managed to survive cuts in funding were forced to abandon whole areas of client services. Coupled with this decrease in funding was the imposition of additional restrictions on the types of cases on which legal services programs could provide assistance.

The decade of the 1990s produced even greater blows to legal service programs seeking to improve the condition of those in poverty. An occasional increase in funding in some years was offset by attempts in other years that came perilously close to defunding Legal Services Corporation entirely. The most significant cuts came in 1995 when Legal Services Corporation's funding was slashed 30% resulting in the loss of 13% of field staff and the closure of nearly 13% of local legal service offices. At the same time that budget cuts decreased the number of lawyers serving poor communities, Congress imposed further restrictions limiting the activities of the lawyers that remained. Poverty law programs receiving federal funding were barred from engaging in a wide variety of activities on behalf of indigent clients. Among the prohibited activities are some of the most potent tools available to poverty lawyers—class action lawsuits, legislative and administrative advocacy, or seeking and accepting attorney fees. These restrictions came at a time when the need for effective advocacy for the poor was greatest. Congress enacted sweeping changes in the laws affecting poor communities most directly. Changes in welfare, immigration, Medicaid, and housing laws heightened the demand for lawyers to represent individuals affected by the changes and to influence the ways in which the laws were implemented. The imposition of these restrictions led many poverty law programs to create or “spin off” programs that would not directly

receive federal funding and thus not be bound by the restrictions. Thus, in some regions, legal services to the poor is accomplished by this dual approach, one program that receives federal funding and operates subject to restrictions, while another group receives private or unrestricted funding and remains free from the restrictions.

The past decade has caused legal service programs to think critically about their goals and methods and to explore alternative funding sources. Two trends are dominant. One trend, the consolidation of smaller legal service programs into one larger program, is a response to the prompting of the Legal Service Corporation. This trend results in many local poverty law programs merging and becoming statewide operations. Legal services continue much as before but the larger entity now risks being detached and distant from the local poor community it serves. The other trend, is a response by many programs to develop new strategies, to forge new alliances and explore new methods of advocacy. It is a return in some respects to the genesis of Legal Aid Societies—“community lawyering.” The essence of community lawyering is localism. It identifies and uses the assets and resources in a community, rather than searching for external solutions to problems. This local focus comes at a time when the potential for social change on a larger scale is less promising.

#### Local Origin and Trends

The Louisville Legal Aid Society was formed in 1921. The Women’s Club of Louisville and the Louisville Bar Association were instrumental in founding Louisville’s Legal Aid Society. The Louisville Bar Association has continued its strong support of the Legal Aid Society over the years.



Under Executive Director Emmet Field, who served in the position from 1923-1966, the early days saw work on debtor defense cases and issues surrounding dilapidated housing.

In the late 60s, Louisville's Legal Aid Society received federal money and expanded its program by addressing the systemic problems of the poor, as well as continuing its services on individual client problems. Executive Director John O'Mara guided Legal Aid Society's efforts in the local school desegregation cases. In 1970, Kurt Berggren became the Executive Director and emphasized class action and impact litigation as part of Legal Aid Society's central mission. The program became known for its excellent work on consumer protection cases. During this era, Louisville's Legal Aid Society was among the first of the societies to seek and receive funding to work on community development issues.

In 1972, Dennis Bricking became the Executive Director and guided Louisville's Legal Aid Society through a period of legal activism. The program engaged in complex litigation involving the unconstitutional conditions of prisons or jails or challenged the lack of due process hearings for individuals denied government benefits. The program expanded from Jefferson County into 14 surrounding Kentucky counties in 1978, with the opening of offices in Elizabethtown and Shelbyville. These offices were forced to close only a few years later because of severe funding cuts during the Reagan Administration, although Legal Aid Society continues to provide services in these counties from its office in Louisville.

Under Dennis Bricking's leadership, the program secured funding for population-specific services. This allowed Legal Aid Society to further its mission and reach more

effectively underserved populations such as the homeless, victims of domestic violence, and people living with HIV/AIDS.

In 1995, there was a second set of cutbacks, amounting to about 25%, and the Legal Aid Society began to seek and depend more on local funding. The Legal Aid Society now sees only about 45% of its annual budget coming from the federal Legal Services Corporation, with the remaining 55% being raised at the state and local levels. This local funding for population-specific services defines much of Legal Aid Society's current services. In addition, the restrictions imposed by Legal Services Corporation on what legal assistance may be offered with its funding further defines the parameters of Legal Aid Society's services.

## WHERE WE ARE TODAY

### Client Need

Legal Aid Society helps people living in low income in fifteen Kentucky counties, representing both urban and rural areas. The largest of these counties is Jefferson County (population 664,937); the smallest is Trimble County (population 6,090). The greatest number of people in poverty within this region lives in Jefferson County. Nine of the other fifteen counties have at least fifteen percent of their residents living at or below the poverty level. Some counties (e.g., Marion County) have as great as twenty-five percent of their residents at or below the federal poverty level. An estimated 140,000 people who are eligible for Legal Aid Society's services live in this fifteen county region.

In 1999, Legal Aid Society conducted an assessment of the types of legal problems people with low income in this region experience. This survey asked both clients and potential low-income clients to rank those issues which they most frequently experienced a need for legal help. Community service providers, judges, and other interested people were also asked to identify issues perceived to be of most importance to low-income clients based upon observations, experiences and contacts with the client community. The following results were determined by the number of respondents identifying a particular issue in relation to the total number of surveys returned.

Family Law	19%	Disability Issues	7%
Landlord/Tenant	14%	Miscellaneous	5%
Government Benefits	13%	Home Ownership	4%
Consumer	11%	Employment	3%
Utilities	9%	Education	3%
Health Care Access	7%		

In July 2000, Legal Aid Society established priorities—core service areas tailored to meet these identified client needs. These priorities are:

- Safety, Stability and Health;
- Maintaining Economic Stability;
- Preserving the Home;
- Supporting Families; and,
- Working with Populations with Special Vulnerabilities.

Legal Aid Society works in these core areas to improve the conditions of low-income individuals and families.

#### Client Services

Each year Legal Aid Society represents several thousand individuals or groups whose incomes are at or below 125% of the federal poverty guidelines (\$10,400 annually). Due to limited resources, Legal Aid Society is able to help only a fraction of low-income individuals in need. Where Legal Aid Society identifies a client's legal problem as a priority and provides direct legal help, Legal Aid Society has success in achieving a favorable result for clients. For example, Legal Aid Society helps clients avoid unfair debt collection; regain family stability through formalized court orders that stop domestic violence; obtain disability payments when medical impairments prevent employment; or, maintain housing in the face of unlawful eviction actions.

Legal Aid Society accomplishes this work through the collaborative effort of the multiple departments or projects within Legal Aid Society that offer expertise in substantive areas. Legal Aid Society's work follows from the priorities set in 2000:

*Safety, Stability & Health:*

- *Family Law Advocacy:* Assisting victims of domestic violence break the cycle of violence by helping them obtain protection from the courts and by helping them terminate dangerous and destructive relationships through the dissolution of marriage

*Preserving the Home:*

- *Children-at-Risk Project:* Promoting family stability and minimizing disruption of education by preventing dislocation and homelessness for families and children.
- *Housing Advocacy:* Representing clients in eviction actions, public housing grievance hearings, and administrative hearings in which the families could lose a housing subsidy.
- *Community Development Program:* Providing advocacy on utility rate issues affecting low-income consumers and empowering client groups to assist in developing affordable housing and on other issues in economically distressed neighborhoods.

*Maintaining Economic Stability:*

- *Government Benefits Advocacy:* Representing low-income families and individuals in securing or continuing eligibility for government assistance programs.
- *Consumer Protection Advocacy:* Protecting clients' resources from debt collection that will diminish their ability to sustain a household.
- *Welfare to Work Advocacy:* Assisting clients on transition from welfare to work by resolving legal impediments to maintaining employment.

*Supporting Families:*

- *TeamChild Project:* Representing children in school proceedings and advocating for proper educational placement and other services.

*Working with Populations with Special Vulnerabilities:*

- *HIV/AIDS Legal Project:* Representing HIV/AIDS patients in ensuring access to health care and other related issues.
- *Nursing Home Ombudsman Program:* Protecting nursing home residents on matters relating to their care and personal needs.
- *Senior Citizens:* Providing legal assistance to senior citizens on property disposition and related matters.
- *Homeless:* Representing homeless individuals in securing medical, housing and essential services to provide stability.

Legal Aid Society's Volunteer Lawyer Program supplements this work by recruiting volunteers to assist on cases where agency staff may not be able to offer specialized assistance. In addition, the Volunteer Lawyer Program conducts clinics and other outreach programs providing services to clients in targeted areas (will clinics, tax assistance, etc.).

#### Partnerships and Collaboration to Meet Client Needs

The Legal Aid Society works closely with a wide variety of community groups and social service providers. Foundations and government now expect collaboration among providers.

As a Metro United Way recipient, Legal Aid Society coordinates services with agencies, such as Family and Children's Agency, serving victims of domestic violence, and the Coalition for the Homeless, serving the homeless and mentally ill. The Housing Advocacy Unit works closely with the Louisville Tenants Association in addressing the problems facing tenants.

Legal Aid Society's ties to the Louisville Bar Association date from Legal Aid Society's formation. The Louisville Bar Association is a faithful supporter of Legal Aid Society and collaborates on special projects. The various sections of the bar association provide volunteer attorneys to the Volunteer Lawyer Program. The bar association's financial arm, the Louisville Bar Foundation, partially underwrites special initiatives or technology needs identified by Legal Aid Society.

The HIV/AIDS Legal Project of Legal Aid Society collaborates with social service providers working to assist the needs of persons living with HIV/AIDS. This collaboration is evident in the providers' annual joint fundraising venture—the Louisville

AIDS Walk—and in the commitment of the various providers to create a one-stop service center for people with HIV/AIDS by locating the Legal Project's office and other service providers' offices within close proximity.

The Community Development Program collaborates with both city and county government in providing services to non-profit corporations in Jefferson County. In addition, the Community Development Program works jointly with the community and client groups on common goals and problems facing the low-income community. Legal Aid Society also collaborates with the Jefferson County Public Schools in providing services for families with school-age children and migrants. This collaboration aims at stabilizing the housing and family to reduce the disruption caused by eviction and/or frequent moves.

The Brandeis School of Law at the University of Louisville supplies volunteer law students on a regular basis through their public service program. The partnership allows Legal Aid Society to staff will clinics or child support clinics and to benefit from student research projects. The school also provides summer students at no cost to either program.

The most recent collaboration is with the Workforce Investment Board, wherein Legal Aid Society provides civil legal assistance to participants in the board's Welfare-to-Work program. The goal of the collaboration is to eliminate legal barriers that interfere in a former welfare participant's quest to gain and to keep employment.

## **WHERE LEGAL AID SOCIETY WANTS TO BE IN THREE YEARS**

Non-profit legal assistance programs, such as Legal Aid Society, are in transition, perhaps even transformation. This is a result of many factors including changes in the law affecting low-income persons and widespread recognition that changes are needed in the delivery system. The principal driving force, however, has been the reduction in federal funds, the restrictions on all funds of Legal Service Corporation recipients, and the loss of funding for support and training. As in any transition, while we do not know exactly how this system will evolve, we are in a position to shape its direction. Thus, the fundamental issue is: *how should civil legal assistance be organized for the first decades of the 21st century?*

*Equal access* to justice is the unifying theme of civil legal assistance. Equal access requires a civil legal assistance system that provides equal access to the justice system without regard to a person's economic status. Mere access to services or advice, however, is not enough. The civil legal assistance provided to a person must offer substantive advice and advocacy that achieves fair results. A legal services provider must be capable of offering legal help appropriate to the level of need.

A Strategic Plan to achieve access based on what we know about the legal needs of low-income persons should include the following elements:

1. An intake and diagnostic system to determine efficiently the level of service any applicant needs.
2. A referral system that provides the type of services needed. This may include direct representation by staff or reliance on other resources. These would include pro bono advice panels, evening or weekend workshops or



clinics, high volume automated document assembly systems, and development of pro se assistance tools.

3. A coordination with human service providers and community-based organizations both to deliver more holistic services to more people and to ensure that non-legal services providers make available to those served relevant information about legal rights and how to access the system.
4. A use of new technologies and the Internet to assure full communication with other legal services staff involved in delivery of legal services and to support the most efficient use of staff time.
5. A commitment to increase capacity to provide direct representation in courts and in administrative and legislative hearings.

Legal Aid Society's plan the next three years flows from these essential elements. The following strategy outlines Legal Aid Society's commitment to core services and to fashioning a service delivery system that meets clients' evolving needs.

A. Strengthening Legal Aid Society and Its Core Services

Legal Aid Society's core services track the priorities and case acceptance policy established by the Board of Directors. Our core services to clients, both in the near future and three years out, should reflect the needs of targeted populations, including:

- victims of domestic violence
- the homeless, including applicants for disability benefits
- families at risk of becoming homeless
- children forced to move from school to school because of unstable situations at home

- children in the juvenile court and educational systems in need of help to stay in school
- people living with HIV/AIDS and other life-threatening medical conditions
- community groups that serve the interests of eligible clients
- clients moving from welfare to work
- seniors

At the same time that Legal Aid Society targets these populations and receives local funding for these specific services, we must renew our commitment to general program services. In an era of decreasing federal funding it is important not to overlook the continuing need within our region for legal services to the low-income population which does not fall within a targeted group. We recognize there is still much work to be done in providing legal assistance in the rural counties. For example, we should extend our success in community development work into the more impoverished counties in our service area. Our success in assisting victims of domestic violence could be repeated in the rural counties. Our work in these counties on these and other issues requires the development and active involvement of volunteer lawyers in these counties.

The challenge of strengthening our core services is funding. Legal Aid Society receives little new funding that allows for increased basic program services either in Jefferson county or the rural counties. Legal Aid Society must:

- Identify funding sources that will increase capacity. Fellowships for staff attorneys (either through National Association for Public Interest Law or through local law firms and corporations) would provide increased staff to the program and would allow for their assignment in the areas of greatest need.

The annual attorney campaign and the funding received from the state legislature are currently the program's major sources for this capacity building.

- Structure a service delivery system that allows staff to be used most productively. Staff talent is wasted if not used to fullest potential. Other legal service programs across the country have found various ways to provide service to clients and to measure quality. Legal Aid Society must review whether such practices (group case conference, emergency attorney for the day, teams with diverse specialties, managers who mentor) could help in more effectively delivering services without increasing staff.
- Use technology to supplement and further our work. Technology can improve program management and the delivery of client services. In addition to office automation, intake and telephone helplines, linking other legal service programs, technology should allow us to communicate with courts and share information about clients with social workers, shelter providers, and others working on client needs. Tracking the outcomes of cases for funding sources and internal quality reviews will be enhanced through technology.
- Seek and accept funding for targeted populations or on issue-specific case services. For example, the work and success of the HIV/AIDS Legal Project in assisting individuals with a life-threatening medical condition could be repeated for patients with breast cancer or other forms of cancer. This extension of service to a targeted group of clients would likely draw funding

from new sources and would require only minimal additional investment in staff training, support and supervision.

B. Encouraging Preventive Education and Pro Se Advocacy

Technology has the potential to educate clients about their rights, help them understand when they could benefit from legal assistance, and help them find a lawyer or actually complete a form and proceed pro se. Legal Aid Society must explore creative ways in which to encourage:

- Changing court procedures and practices to enable more effective and efficient self-representation.
- Making information helpful to our clients more widely accessible.

C. Forming Collaborative Partnerships

To meet the challenges of the legal services restrictions and to participate in a holistic approach to addressing the legal needs of low-income clients, Legal Aid Society must expand beyond the traditional role of tapping individual attorneys for a particular case and engage in one or more of the following activities:

- Developing a resource for complex litigation. One of the most significant restrictions on LSC funded programs is the prohibition on initiating or participating in class action cases. Yet class actions are often essential tools to prevent continued illegal actions by government or private entities. Legal Aid Society must work with the private bar and the legal community in developing a resource where those cases with the potential for complex litigation may be referred.

- Developing relationships for mentoring and co-counsel opportunities between staff and the private bar. The private bar has a wealth of experienced attorneys willing to partner with program staff, particularly on cases in which the private attorney may request attorney's fees as the prevailing party. Legal Aid Society staff must explore those co-counseling opportunities to further client service capacity, to provide mentoring opportunities for inexperienced staff, and to extend Legal Aid Society's reach into the community.

D. Marketing Legal Aid Society

In an era of unparalleled economic success in our nation, communities often overlook that a significant number of our neighbors continue to live in poverty—and that they are not living in poverty by choice. The need for legal assistance for the poor is as critical now as it was in the 1960s when the national legal services program was first founded. However, this message of need and the stories of Legal Aid Society's success frequently are overlooked. Successful marketing—telling the community of the need for Legal Aid Society—requires a collaborative effort of the staff, board, private bar, bar leadership, and other community leaders.

## STRATEGIC OBJECTIVES

Mission Statement: Pursue justice for people in poverty.

Legal Aid Society will achieve its mission by:

### **Objective 1: Client Services: Providing quality and appropriate legal services to individuals and clients.**

#### *Strategies*

- 1A Institute a continuous improvement process for key service areas.
- 1B Help clients represent themselves.
- 1C Establish Volunteer Lawyer Program in 15 counties.
- 1D Increase preventative education.
- 1E Develop a useful range of options for clients that do not qualify for direct services.
- 1F Continue prioritization process to develop “case acceptance policy” with emphasis on programs most closely connected to mission and those in which LAS excels.

### **Objective 2: Advocacy for Social Policy: Working for social changes that empower clients.**

#### *Strategies*

- 2A Work to change laws at the legislative level.
- 2B Network with other kindred organizations more proactively in order to help shape community decisions that affect clients.
- 2C Develop client partnership approaches that result in client participation in community decision-making groups and processes.
- 2D Expand clients’ economic development capacity.
- 2E Develop impact case referral process.

### **Objective 3: Coordination and Administration: Enhancing internal excellence, productivity and teamwork.**

#### *Strategies*

- 3A Develop more efficient and flexible use of staff, volunteers and partners through an ongoing review of needs and resources.
- 3B Support and foster the development of a productive and happy workplace with high motivation and accountability.
- 3C Integrate use of technology.
- 3D Continue to review and use existing recommendations from October 1998 and September 1999 staff sessions and to further analyze additional input from the June, 2000 staff survey. Based on these, develop an annual plan to implement proposed solutions.

- 3E Continue and improve staff and volunteer recognition system.
- 3F Coordinate with state planning process in the development of collaborations that improve efficiency and client services.
- 3G Oversee implementation of facility improvements while exploring other options.
- 3H Provide training for LAS advocates at the local, regional and national level and position LAS locally as source for expertise.

**Strategic Objective 4: Fund Development: Aggressively developing a secure funding base.**

***Strategies***

- 4A Form a Legal Aid Society “Board of Trustees” which will take an active role in fund development.
- 4B Board of Directors to define/approve mission, scope and recruitment methods to develop Board of Trustees.
- 4C Further develop Board of Directors through specific committee work and a more active role in planning and evaluation
- 4D Increase number and level of contributions from the legal community.
- 4E Further develop the event fund-raisers.
- 4F Develop data base of current and potential funders.
- 4G Increase funding from the general community.
- 4H Identify mission compatible grant opportunities, with input from staff and board, and form strategic alliances in carrying out services.
- 4I Target 100% staff and board participation in annual campaign.
- 4J Develop a planned giving program.
- 4K Establish donor recognition program.

**Strategic Objective 5: Public Relations: Developing an increased awareness of Legal Aid’s role in the protection of rights and the provision of community services and to focus on both internal and external public relation strategies.**

***Strategies***

- 5A Develop a staff public relations committee that oversees the implementation of internal public relations improvements (construction of prominent sign in lobby, coordinate allocation of public and private space within the building).
- 5B Designate intake phone system (includes both equipment assessment and procedures) as a project in the continuous improvement plan (both a service and public relations objective).
- 5C Publish newsletter that includes staff, donors and clients.
- 5D Develop an annual public relations plan that heightens awareness of the work performed by the Legal Aid Society and the challenges faced by its clients.
- 5E Coordinate a speakers bureau of staff, board and other volunteers.
- 5F Develop a quick response and public relations crisis management plan.
- 5G Develop and maintain a web page.

## **BELIEFS AND GUIDING PRINCIPLES**

Legal Aid Society believes that justice should be the same, in substance and availability, without regard to economic status. A community is stronger when all citizens are able to achieve equal access to justice. Our commitment to enforce, enhance, and defend the legal rights of low-income individuals and groups derives from our organizational beliefs and guiding principles. Legal Aid Society strives to ensure that its work reflects these beliefs and guiding principles.

### **Beliefs:**

- We believe low-income individuals and groups deserve quality legal advice, advocacy, representation and referral on civil legal problems affecting individual needs and community-wide gaps in service.
- We believe our limited resources must be used equitably and wisely to address not only clients' individual legal problems but also the systemic barriers to justice for people in poverty.
- We believe effective and quality advocacy on behalf of people in poverty requires a financial investment by the community and a commitment of support from the bar and other leaders in our community.
- We believe an organization receives such support only when it identifies a community need, capably demonstrates the ability to provide a solution, and, persuasively reports its results to the community.
- We believe clarity and consistency in understanding our mission and our goals and in what we expect from each other is critical to our success.

### **Guiding Principles:**

- *We are responsive to our clients' needs.* We give priority to clients' civil legal problems that have the greatest impact on their lives, either because of the nature of the problem or the number of people affected.
- *We give our best effort in everything we undertake.* We take responsibility for our decisions, acknowledge our limitations, and learn from our mistakes. In all things, we do what we say we are going to do.



- *We respect the individual.* We make commitments with care. We act honorably and ethically in our relations with our clients, the public and our colleagues. We require complete honesty and integrity in everything we do.
- *We are frugal.* We guard and conserve our organization's resources with at least the same vigilance that we would use to guard and conserve our personal resources. We use our limited resources to provide quality services most effectively.
- *We honor the many talents of our organization.* We are a passionate and diverse workgroup that acknowledges our work must transcend personal interests. We work cooperatively as ambassadors for the organization. We nurture and enrich the efforts of our workgroup by providing a supportive work environment and just rewards.